

HOW TO... Use master and subdocuments

There's a little-known feature in Word that can make managing lengthy, complex documents so much easier. Sheona Gillespie breaks things down for you

A document that is made up of many parts, such as a report or book, is often also worked on by more than one person. The master and subdocument feature in Word can make such a complex file far easier to manage. This handy feature breaks down the file into many subdocuments, all contained within the one, master, document. Here, we'll show you how to use the feature in Word 2003.

1 The master document and its subdocuments will need to be contained in the same folder. Either choose an existing folder or create one. Next, you'll need to set up the master document. If you are starting this project from scratch, open a new document with File, New, Blank Document. From the View menu, select Outline. Enter a heading for the master file and headings for each of the subdocuments you'll be creating.

2 Click inside the first heading, the one that will be the title of your master file. Make sure Heading 1 is selected in the Styles and Formatting box; this is the first box on the Formatting toolbar. If this toolbar isn't visible, select View, Toolbars, Formatting. Then place your cursor inside the next heading, which will eventually become the first of your subdocuments. Make sure Heading 2 is selected.

It is easiest if all the subdocument headings are formatted the same way. To do this quickly, highlight the others and select Heading 2. Follow the same steps to convert an existing document into a master. Just apply the Heading 1 style to the master heading and Heading 2 to the subsequent subdocument entries.

3 Now you can create your subdocuments or use existing files as subdocuments. To create one, select the heading (and text if there is any already in the file) you want to separate out into its own file. Click on the Create Subdocument button on the Outlining toolbar; it has the icon of a page inside another page. You can do all the headings at once, providing you've used the same heading style for all the subdocument headings. Highlight them all and click on the Create Subdocument button.

4 Select Save As from the File menu. Click in the Save In box and find the folder you created in Step 1. Enter a name for the master document, select the file type and click Save. The subdocuments you created in Step 3 will automatically be generated within the same folder. Each subdocument's name will be based on its heading name in the master document. In our example, this means that the first subdocument is called Chapter One.doc.

MASTER AND SUBDOCUMENTS AT A GLANCE

- Only rename or move subdocument files from within the master. Open the master and, if the subdocuments are expanded, click on the Collapse Subdocuments button.
- You'll know when the subdocuments are collapsed, because you'll see their blue, underlined hyperlinks. Hold the Ctrl key down and click on the hyperlink for the subdocument you want to rename. The subdocument will open; select Save As from the File menu and give it a new name. On the master, the hyperlink will show the new filename.
- Press the Expand Subdocuments button to return to the collapsed view and get rid of the hyperlinks. The entry for that subdocument will not have changed here. Just click on the heading and type in the new name.

5 To turn an existing file into a subdocument, open the master file and make sure that Outline is selected in the View menu. Click on the document where you'd like to place the new subdocument. There needs to be a blank line between it and the subdocument above. Click on the Insert Subdocument button on the Outlining toolbar. In the dialog box that appears, enter the name of the document you want to turn into a subdocument and click on Open. The name of the new subdocument will appear in your master document. Click anywhere on its name and select Heading 2 from the Styles and Formatting menu. Save the file.

6 To open a subdocument from within the master document, double-click on the little icon in the top left-hand corner of the subdocument's heading. This icon will not be visible if the document is in Master Document View. To toggle this view, click on the Master Document View button on the Outlining toolbar. If there is a little padlock symbol under this document, you will need to unlock it. Click on the Expand Subdocuments button. This should be next to the Master Document View button; click on that button if you can't see the Expand Subdocuments button. To close a subdocument and return to the master, select Close from its File menu.

